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**Montana**  
**Office of Public Instruction**  
Denise Juneau, State Superintendent

# **Annual Data Collection**

## **Software User Manual Citrix Setup**

September 2009

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## Introduction to Annual Data Collection (ADC) Software



- A checkbox for Highly Qualified Teachers has been added to the staff assignment screen. You will need to check that box for every assignment that is being taught by a Highly Qualified Teacher.
- Homeless Liaison contact information will now be collected and updated through ADC
- A checkbox for Dual Credit assignments has been added to the staff assignment screen. You will need to check that box for every assignment for which students are receiving Dual Credit.
- Job codes have been added to specify whether special education teachers are Sole Providers or Not Sole Providers of Core Academic Instruction – see Glossary for definitions.
- Technology Use Report has been broken into two forms, one to be filled in at the school level and the other at the district level.
- District Personnel Recruitment Report replaces the Personnel Recruitment and Retention Report. This form addresses district vacancies by subject area and grade level, and the difficulty of filling them.
- Indian Education for All questions have been modified from last year.
- New passwords were mailed to the districts in June 2009. If you are doing data entry in September or October, remember to add SO to the end of the core password.

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### Steps to Save You Time

#### *Printing multiple reports at once*

*If you are a district and want to print any one report for all the schools in your district at once:*

- Log in using your district user name and password.
- Make sure that the main menu lists your user level as District Level.
- Select the Reports menu
- Double-click the report you wish to print.
- Choose Print at the top of the Preview pane.
- The option will print the district level report (if one exists) and one report for each school in the district.

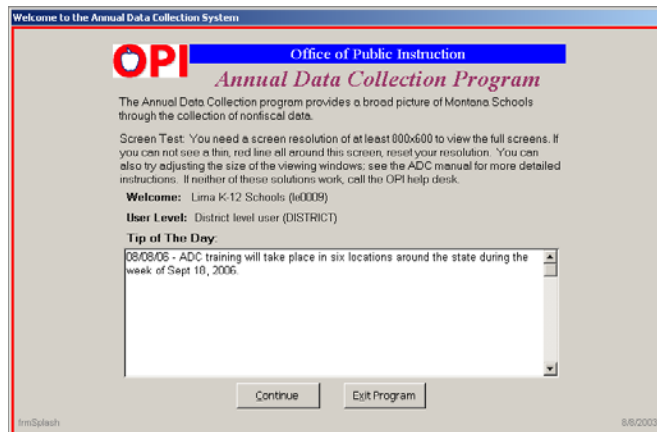
#### *Escaping from a page that is holding you captive:*

If you are stuck on a page and can't make changes or exit, [use the Esc key](#). This key will return the form to its original (last saved) state and allow you to continue adding data or exit the form.

\*\*\*\*\*

## Getting Started

By this time you should have downloaded the Citrix software, and logged in. If you haven't logged into Citrix since December 2, 2008, or if you are a Vista user, you will need to upgrade your Citrix software (see last section of this manual). After you log in and choose Annual Data Collection from the menu, you will go straight to this screen.



This program will be used by a variety of entities, including school staff, district staff, special education coops, county superintendents and OPI staff. Your access to various data and reports depends on which type of entity you are. Based on your User Name, the program will limit your access to just those areas of concern to you and the data you need to enter. Your User Level is described on this screen; if you believe your User Level is incorrect, contact the Office of Public Instruction at (406) 444-4050, choose option 1 and then option 2.



\*\*\*\*\*

Be sure to read the Tip of the Day each time you log in. The OPI will be using this space to keep you informed of any updates or changes to the system, as well as giving data entry tips and hints.

\*\*\*\*\*

## Change your screen resolution

Some users have had problems viewing full screens in the past. If you cannot see the thin red line all around this screen, you may need to adjust your resolution or viewing window. To change your video resolution, right click on your desktop, choose Properties and select Settings. Move the slider bar under "Screen Area" until a resolution of 800 x 600 (or larger) is displayed. Click OK. You will be prompted to accept the new settings in the "Display Settings" dialog box. The monitor will blank and display the new settings under the "Monitor Settings" dialog box. If you do not click on the OK button at this point, your settings will be returned to normal after 15 seconds. If the video settings appear acceptable, click OK and your monitor resolution will be reset.

To change the size of your viewing window: if you see these three buttons  in the upper right-hand corner of the form, click on the middle button to maximize your window. If you see these buttons , your window is already maximized.


You can also increase or decrease the window size by moving your mouse over one of the corners until you see a double-headed arrow. Click and hold while you drag the corner. This will only change the size of the current window.

## Select your County, System, District, Coop or School

The *Select Your County, System, District, Coop or School* form will be your next screen. Based on your User Name, you will be able to select different entities to work with. If you are logged in as a county, system or district, you will be able to see and edit all the data from all the entities below you in your hierarchy.

**Select Your County, District, System, Coop or School**

Step #1: Select a School or District Below.  
 Step #2: Click on the Get Started button to work with your selection -->  
 You can return to this screen at any time by pressing the Select button.



**Working with All Schools in the County.**


School Year:	2009-2010	Codes:	
County:	Lewis & Clark	25	
System or Coop:	All Systems and Coops	%	
Legal Entity:	All Legal Entities	%	
School:	All Schools	%	

This screen shows you what selection options are currently set and are based on your user id. You can modify any of the white fields. Selections here will determine what forms and reports as well as data you can work with.

frmSetGlobalDefaults

**Select Your County, District, System, Coop or School**

Step #1: Select a School or District Below.  
 Step #2: Click on the Get Started button to work with your selection -->  
 You can return to this screen at any time by pressing the Select button.



**Working at the District Level with District Wide Data.**

School Year:	2009-2010	Codes:	
County:	Beaverhead	01	
System or Coop:	Dillon Elementary	0199	
Legal Entity:	Dillon Elem	0005	
School:	All Schools	%	

This screen shows you what selection options are currently set and are based on your user id. You can modify any of the white fields. Selections here will determine what forms and reports as well as data you can work with.

frmSetGlobalDefaults

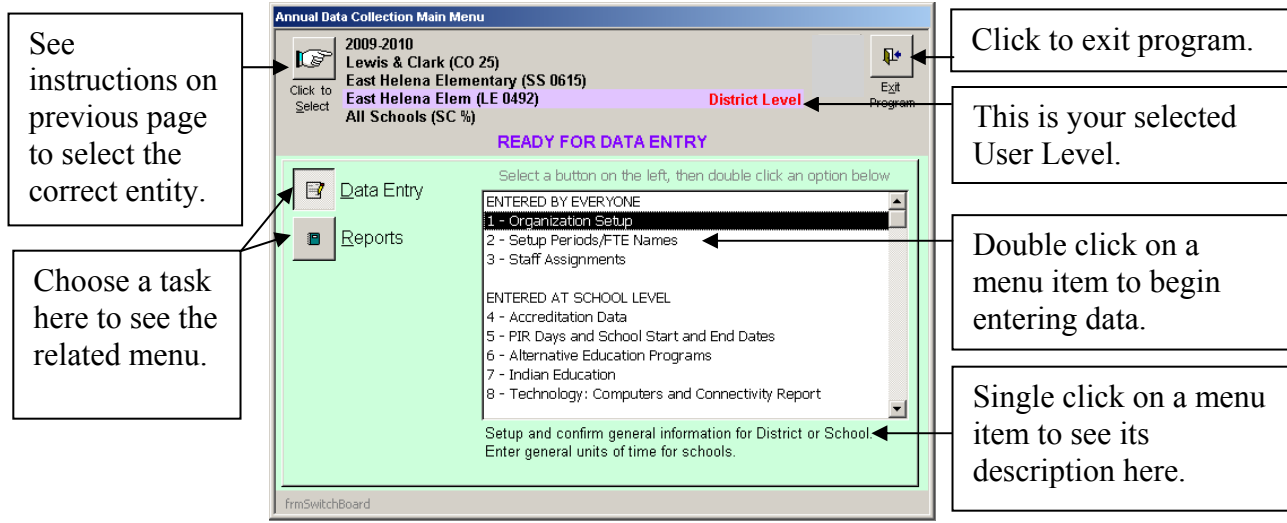
You will only be able to make changes to the fields that are active (white). The grayed-out fields are inactive and not available to your level of user.

Select the county, district or school you would like to work with by scrolling through the dropdown lists, or start typing and the program will auto fill for you. If your User Level is for a school or a special education coop, you will not be able to modify anything on this screen.

*Note:* Whenever you see the Select icon  on a screen, you can click on it to return to this screen and check or modify your choices.

Click Get Started when your selections are complete.

## Annual Data Collection Main Menu



The identity of the school, district, or coop you are working with is shown in the upper left hand corner of the Main Menu and all other forms. Your selection is based on your User Name. For example, a district level user can select to see information for the district as well as each school. Whatever choice the district level user had made appears here. In the above example, a district level user is looking at the data for one school in the district, hence the highlight on School Level. *Pay attention to the highlighted User Level shown on the Main Menu. Some menu items can only be completed at certain User Levels.*

Choose an option from the buttons on the left side of the screen. When you choose an option, the associated menu items will appear in the white screen. Single click on any menu item to view the item's description under the white box. Depending on the type of entity you are, you may see more or fewer buttons and/or menu items.


Since you will be doing data entry, make sure the Data Entry button is selected. You can see the various data entry items available to you in the white box.

Each time you complete a task and click the Exit button at the top right-hand corner of that screen, you will be returned to this Main Menu where you can choose your next task or exit the program.

## Data Entry

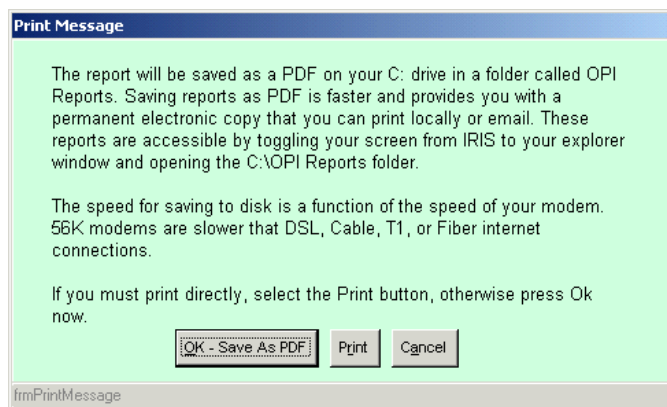
The items in the Data Entry menu are numbered in the order you should select them. There are 14 data entry menu items; organized by user level. Complete all the data entry items that apply to your level of user. For all data entry, type in your answers or select from the dropdown lists. You can move from field to field on any screen by using the Tab key or the Enter key, or use your mouse to click on a field. If you make a mistake or get stuck in a form, try using the Esc key. The Esc key will undo your last change and return the page to its previous state. From there, you can either correct your mistake or exit the form.

## Previewing or Printing a Report

When you have completed filling out any form, click on the Preview Report button  in the upper right corner to view a report. When the report is complete to your satisfaction, print a copy for your records. You can save any report as a PDF file to your C: drive and print from there, rather than trying to print from the OPI Citrix server. This also gives you a permanent electronic copy of each report. See instructions in the next section. Close the report by clicking Close. You also have the option to print any report by choosing the Reports button on the main menu and then selecting the desired report from the list.

## Save as PDF

When you click on the Preview Report button at the top of any report, you will see this message:



The best way to print reports is to choose OK - Save As PDF. This option creates a PDF of the report and saves it to your C: drive in a folder called OPI Reports.

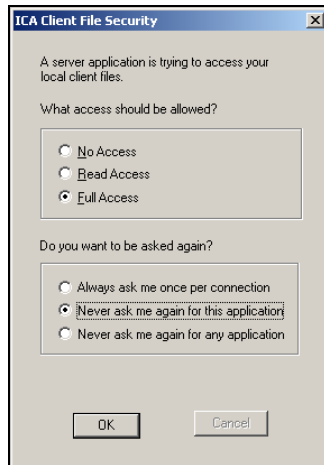
You can then open and print these PDF reports from your own computer, without being logged in to IRIS.

This option gives you a permanent electronic copy of your data, and it is much quicker than printing from the OPI Citrix server.

To print the report while logged in to IRIS, click on the Print icon.

This option may be slower and you will not get a permanent electronic copy of your reports.

To close the report without printing it, click Cancel and choose the Close icon at the top.



If you see this message the first time you try to print, choose Full Access for question one and answer question two however you prefer.

This gives the Citrix server the right to create a folder on your C: drive called OPI Reports.

## 1 - Organization Setup – *To be completed by everyone.*

1. Enter your school's total Aggregate Hours per year.
2. Enter the number of minutes of pupil instruction time in a full day and the number of minutes in an average partial day.
3. Enter the minutes per day of passing time for a full day and for an average partial day.
4. Enter the number of full days and partial days of pupil instruction for the 2009-2010 school year.
5. The blue box will be automatically computed.
6. Use the white box at the bottom of the page for any notes or explanation you feel would be helpful.

If you are entering data as a district, your number of minutes per day and days per year should reflect the assignments of the people with district level job codes.



## 2 - Set Up Period/FTE Names – *to be completed for every level where staff assignments will be entered.*

The program will use a naming wizard to name your FTE units for you, using information that you provide. Once you have correctly entered your time units, the OPI will be able to calculate each person's FTE accurately.

FTE or full-time equivalent refers to the number of hours of work normally required in a full-time position. An FTE Unit is a portion of a full-time position dedicated to a specific job assignment. For example, a full-time principal would be assigned 1.000 FTE. If you have a person who acts as school counselor for  $\frac{3}{4}$  of the day and librarian  $\frac{1}{4}$  of the day, that person would be assigned 0.750 FTE for the school counselor job code and 0.250 FTE for the librarian job code. For a departmentalized teaching staff (i.e., Junior High, 7-8 schools, Middle Schools, and High Schools), you will need to define a time unit for each period of the day. You must create an FTE unit for P-1, P-2, P-3, etc. We need to collect grade low, grade high and student load for each period of the day, so a full-time high school English teacher cannot be assigned 1.000 FTE.

Your organization's data from the previous school year will be rolled forward, so you will not have to re-enter time units each year. Carefully check each existing unit to make sure it is an accurate reflection of your current school day. If not, you can modify the unit or create a new unit that more clearly describes the time segment. You won't be able to delete a Period/FTE Name as long as it has been assigned to a current teacher record.

**Period/Fte Names for Organization**  
**Bridger High School**

FTE is the "full-time equivalent" which is the number of hours of work normally required in a full-time position.

Period/FTE Name	FTE
0.429 FTE	0.429
0.500 FTE	0.500
P-1	0.143
P-2	0.143
P-3	0.143
P-3 A	0.072
P-3 B	0.071

frmFteUnit    Work with Selection    Add a New Period/FTE    Delete Selection

To modify an existing time unit, select it and click Work with Selection, or double click on the time unit. To add or delete FTE units, choose the appropriate button.

## Using the Naming Wizard to create Period/FTE Names

Choose whether this time unit will be described as a Percentage or as a Period:

### If you choose Percentage FTE:

Step 1 - Enter the decimal equivalent for this assignment in the FTE field. The wizard will name the FTE unit to match the decimal you entered and display it in the blue box.

Step 2 - Click on Save and Exit to return to the previous screen.

### If you choose Period:

Step 1 - You will be prompted to enter a number for the period. Click OK or press Enter.

Step 2 - Indicate which days of the week this period meets by typing in the initial letters for the days. Use R for Thursday. If you have A and B days, type A or B. Press Tab or Enter.

Step 3 - Choose which term this period meets. If you choose Semester, Trimester, Quarter or Other you will be prompted to input a number for the term. Click OK or press Enter. The wizard will name your unit based on your answers to the above steps and display the name in the blue box at the bottom of the screen.

Step 4 - In the white FTE box, enter the decimal equivalent for this period. For example, if your school day has 8 periods that meet daily all year, the decimal equivalent for each period would be 0.125. For a class that meets daily for one semester, the decimal equivalent would be 0.063. For help in calculating FTE, click on Click Here to Calculate FTE in the bottom right corner of the form. *See instructions below.*

Using the FTE Calculator:

You can calculate FTE for any unit by entering the number of minutes per day and days per year for that period in the numerator.

Type your school's total minutes per day and days per year in the denominator and press Enter; the calculator will compute the FTE for you. Type that decimal in the white FTE box on the previous screen.

To figure FTE if all your periods are the same length and meet daily all year, use the bottom half of the screen. Enter one in the numerator and your total periods in the denominator; press Enter to calculate the FTE for all periods. Type that decimal in the white FTE box on the previous screen.

Step 5 - Choose Save and Exit to save this FTE unit and return to the previous screen. If you change your mind and don't want to save your changes, select Exit without Saving. The original data will be restored and you will return to the previous screen.

### 3 - Staff Assignments – *Coop Level, District Level, and School Level*

#### Entering District Level Staff Assignments

You must be logged in as a county or district and your User Level shown on the Main Menu must say District Level. You should only enter staff with District Level Assignment Job Codes as shown on the job code list. The first column of the Assignment Summary Screen (see below) lists the level of the job assignment for each person.

#### Entering School Level Staff Assignments

The Main Menu must indicate that you are doing data entry at the School Level. If you are logged on as an entity other than a school, click on the Click to Select button in the upper left hand corner of the Main Menu and choose the school for which you will be doing data entry. You should only enter staff with School Level Job Assignment Codes as shown on the job code list. The first column of the Assignment Summary Screen (see below) lists the level of the job assignment for each person.

#### Entering Instructional Paraprofessionals

Instructional paraprofessionals will be reported on the School Level Personnel Form. All instructional paraprofessionals currently reported in the ADC and any newly added instructional paraprofessionals must reflect highly qualified status, if they qualify. Highly Qualified means they have either: two or more years of higher education, an associate's (or higher) degree, or academic assessment. Federal reporting requirements for 2009-10 include the reporting of these data. Highly qualified status can be added to the personnel record for an instructional paraprofessional by choosing Work With Person and then Update Person. The highly qualified status types are listed on the License Type pull-down menu.

Any instructional paraprofessionals who are paid with Title I funds should have a job code of PP02, and those paid with Special Education funds should have a job code of SE25.

Data entry for instructional paraprofessionals is the same as for any other staff. Paraprofessionals are in the personnel database if they have worked as a paraprofessional in the past five years. If they are not already on the list, you will need to add these people to this list before you can assign them job codes and FTE. Be careful not to add a person who is already in the list. See the section titled *Add a New Person Not Found in List*.

### **Entering School or District Special Education Staff**

Schools and districts must report all special education personnel contracted with or employed by the district to provide special education and related services to students with disabilities. See list of Special Education Job Assignment Codes in the Reports section on the Main Menu or at <http://www.opi.mt.gov/ADC/index.html>.

If an employee is not assigned to a specific school the school district must either prorate the employee's time to individual schools in which the students the employee works with are enrolled, or choose one school under which to report the employee. An example of this type of employee might be a speech-language pathologist who has no ties to one specific school and provides speech services to students living throughout the district.

School districts that are members of a special education cooperative do not report personnel employed by the cooperative who provide services to the school district.

When reporting school psychologists, school counselors, school nurses, and social workers the FTE count must reflect the time employed to work with all students and the time employed to work with students with disabilities. The job codes should reflect this breakout.

For teachers with a special education class assignment that includes PK, the staff assignment must reflect the percent of time that is spent with PK students. Calculate the percentage based on the number of PK students divided by the total students in the class.

When entering data for special education staff the proper job assignment code must be used to indicate whether the teacher is the sole provider of academic content in the core academic subject.

At the elementary level, sole provider of elementary curriculum means a teacher who is the exclusive instructional decision maker for student(s) in grades PK-8. If a special education teacher is the sole instructor to any elementary student for 60% or more of the school day, the teacher is considered to be the "sole provider" of elementary curriculum and the SE04 (Special Education teacher sole provider) or SE05 (Special Education Intern sole provider) job assignment code would be used. If the special education teacher is not the sole provider of elementary curriculum for any student the SE02 (Special Education teacher not sole provider) or SE03 (Special Education Intern not sole provider) code would be used.

At the secondary level, Sole provider of core academic content means a teacher who is teaching a secondary level core academic class(s) without input from another teacher who meets the

federal HQ requirements in that core academic subject. "Secondary level core academic class(s)" means any setting in which organized instruction of core academic content is provided to one or more students who are receiving credit for the class toward graduation. Because special education teachers often teach multiple subjects during any given period of the day, a class for secondary level special education teachers is defined as a subject. If a secondary special education teacher is the sole provider of academic content in a core academic subject for any student, the SE04 or SE05 job assignment code should be used for that subject. If a secondary special education teacher is not the sole provider of academic content for any student in a given core academic subject the SE02 or SE03 job assignment code should be used for that subject.

**NOTE:** For personnel who are paid from more than one federal program, the FTE must reflect as accurately as possible the time spent in each program. Example: The FTE units for a teacher whose salary is paid from special education and Title I should be broken out to reflect the salary breakout.

**NOTE:** Personnel reported under the job code of Special Education Instructional Paraprofessional (SE25, or SE26 for itinerant) are individuals who provide assistance with classroom instruction and must comply with the No Child Left Behind requirements for Instructional Paraprofessionals. Highly qualified status must be addressed. See section on Entering Instructional Paraprofessionals for more specific instructions.

**NOTE:** If one of the general job codes listed below for special education is used, an additional description of the job duties must be included in the text field titled "Additional Job Description."

Other Professional Staff, Special Education (SE31 or SE32 for Itinerant)

### **Entering Special Education Cooperative Personnel**

Each cooperative must report all special education personnel employed and/or contracted to provide special education services. Itinerant personnel must be marked with appropriate job codes. An itinerant employee is one whose job requires working with or serving children in more than one school district and requires travel. Each special education job code will specify itinerant or not. Example: There is a job code for school psychologist – special education [SP24] and a job code for itinerant school psychologist [SP25]. Refer to the list of special education job codes for cooperative personnel.

If you need further assistance with entering special education personnel, call the OPI Help Line at (406) 444-4050; choose option 2.

## Assignment Summary Screen

The Assignment Summary screen has been pre-filled with staff names from last year. From this screen, you will delete names of staff no longer at this organization, add new staff members and modify the assignments of continuing staff members.

The screenshot shows the 'Assignment Summary' window for the 2009-2010 school year at Lewis & Clark (CO 25). The window title is 'Assignment Summary'. Below the title bar, there is a 'Click to Select' button and a list of school/district names: 'East Helena Elementary (SS 0815)', 'East Helena Elem (LE 0492)', and 'East Valley Middle School (SC 1720)'. The main table has columns: 'School or District Name', 'Job Category', 'FTE', 'Student Sum', 'Load', 'No. of Assign.', and 'No. of Issues'. The table lists 17 rows of staff assignments for 'East Valley Middle School'. At the bottom of the window, there is a toolbar with four buttons: 'View With Person', 'Add Person', 'Delete Person', and 'Transfer Assignments'.

School or District Name	Job Category	FTE	Student Sum	Load	No. of Assign.	No. of Issues
School 1720 East Valley Middle School	Building Administrative	1.000	302	1	0	
School 1720 East Valley Middle School	Paraprofessional	1.000	352	1	1	
School 1720 East Valley Middle School	Teacher	1.000	167	8	0	
School 1720 East Valley Middle School	Teacher	1.000	166	0	0	
School 1720 East Valley Middle School	Teacher	1.000	188	8	8	
School 1720 East Valley Middle School	Special Education	1.000	12	1	1	
School 1720 East Valley Middle School	Teacher	1.000	143	0	0	
School 1720 East Valley Middle School	Teacher	1.000	18	8	0	
School 1720 East Valley Middle School	Teacher	1.000	141	8	0	
School 1720 East Valley Middle School	Teacher	1.000	140	0	0	
School 1720 East Valley Middle School	Paraprofessional	1.000	352	1	1	
School 1720 East Valley Middle School	Other FTE	0.330	362	1	1	
School 1720 East Valley Middle School	Teacher	1.000	130	0	0	
School 1720 East Valley Middle School	Paraprofessional	0.600	362	1	1	

Preview Assignment Summary Report.

When one employee is taking over another's assignments, you might save time by using the Transfer Assignments button. You will still need to update grade levels and student counts for each class assignment. See next section for more details.

Make any changes to a continuing staff person's assignments by selecting that person and clicking this button. See directions on the next page.

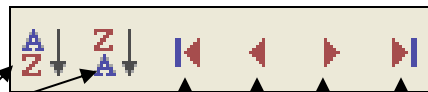
For directions on adding a new person, refer to the **Add New Staff** section of this manual.

To delete the name and assignments of anyone who is no longer with your organization:

- Select that person's record
- Click the Ddelete Person button at the bottom of the form.
- You will be prompted to confirm your decision to delete. Click Yes if you are sure that is what you want or No to cancel the delete command.
- There is no Undo for this procedure.

You can sort the list on the Assignment Summary screen by using the toolbar in the upper left-hand corner of your screen, or by right clicking on a column or selected item. Move your mouse pointer on top of each icon to get a description.

Sort in alphabetical order based on selected column.



Scroll through records individually, or fast forward and backward.

## Work with Person

This screen lists all the assignments for the selected person, including those assignments that are not at your organization. You may not be able to edit assignments at other organizations. This column shows the ones you can change.

Edit?	School or District Name	Job Code	Description	FTE Unit	FTE	Grade Low	Grade High	Student Load
Yes	School 1720 East Valley Middle School	OT	Other (Instructional)	P-0	0.076	6	6	23
Yes	School 1720 East Valley Middle School	MH05	Math	P-1	0.132	6	6	29
Yes	School 1720 East Valley Middle School	PT	Prep	P-2	0.132	6	6	0

Organization Name: East Valley Middle School (School 1720)  
 FTE Unit: P-1 - 0.132 FTE  
 Job Code: MH05 - Math  
 Additional Job Description: 6 Math

☐ This assignment is an Alternative Education assignment ☐ This assignment is taught by a Highly Qualified Teacher ☐ This assignment is a Dual Credit assignment

Lowest Grade: 6  
 Highest Grade: 6  
 Student Load: 29

fmAssignmentPerson Add Assignment Delete Assignment Update Person Cancel Save Work

To update information for this person, click here and make the necessary corrections. Choose **Save and Exit** to return to the Assignment by Person screen. If you change your mind, choose **Exit without Saving**; this button removes the name, gender and race, but License Type and License Info must be physically deleted or they will be saved.

FolioID: 0  
 First Name: Middle: Last:  
 Gender: Race:  
 Additional Qualifications: Enter a partial name, click find to narrow the list. Find Reset  
 License Type License Info  
 fmAssignmentPersonUpdate Save And Exit Exit without Saving

See next section for details on adding and/or editing staff assignments.

To delete an assignment for the selected staff person, select the record to be deleted and click here. You will be prompted to confirm your decision. Click **OK** to continue or **Cancel**. **There is no Undo to this procedure.**

Additional Qualifications fields are for use with licensed staff and paraprofessionals. See the **Add a New Person Not Found in List** section of this manual for information on using these fields.

## Highly Qualified Teachers, Dual Credit assignments, Alternative Education assignments

☐ This assignment is an Alternative Education assignment ☐ This assignment is taught by a Highly Qualified Teacher ☐ This assignment is a Dual Credit assignment

Depending on the job code selected, you will see one or more of these checkboxes for the individual assignment. You must check the appropriate boxes for each assignment. See the Glossary for definitions.



## Edit/Add Staff Assignments

To edit an assignment for the selected staff person, double click the record to be edited. The details of the selected assignment will fill in the bottom half of the screen. Make the necessary changes and then click Save Work. To undo all changes you have made and return the record to its original form, click Cancel. To make more changes/additions to this person's assignments, double click on the next record you would like to edit, or click Add a New Assignment.

**Assignment by Person**

Edt?	School or District Name	Job Code	Description	FTE Unit	FTE	Grade Low	Grade High	Student Load
Yes	School 0765 Alberton School	FA01 Art		0.250 FTE	0.250	K	8	70
Yes	School 0766 Alberton High School	FA01 Art		P-4	0.125	9	12	8
Yes	School 0766 Alberton High School	PT Prep		P-5	0.125	9	12	0

Organization Name: Alberton High School (School 0766)

FTE Unit: P-4 - 0.125 FTE

Job Code: FA01 - Art

Additional Job Description:

☐ This assignment is an Alternative Education assignment ☐ This assignment is taught by a Highly Qualified Teacher ☐ This assignment is a Dual Credit assignment

Lowest Grade: 9

Highest Grade: 12

Student Load: 8

Buttons: Add Assignment, Delete Assignment, Update Person, Cancel, Save Work

**Step 1-** Select the appropriate organization for the assignment. You will only see the organization(s) that you have the right to edit.

**Step 2-** Select the appropriate FTE Unit from the dropdown list. If you need to add or edit your FTE Units at this stage, select Click here to Setup Periods and Time Units.

**Assignment by Person**

Edt?	School or District Name	Job Code	Description	FTE Unit	FTE	Grade Low	Grade High	Student Load
Yes	School 0765 Alberton School	FA01 Art		0.250 FTE	0.250	K	8	70
Yes	School 0766 Alberton High School	FA01 Art		P-4	0.125	9	12	8
Yes	School 0766 Alberton High School	PT Prep		P-5	0.125	9	12	0

Organization Name: Alberton High School (School 0766)

FTE Unit: P-4 - 0.125 FTE

Job Code: FA01 - Art

Additional Job Description:

☐ This assignment is an Alternative Education assignment ☐ This assignment is taught by a Highly Qualified Teacher ☐ This assignment is a Dual Credit assignment

Lowest Grade: 9

Highest Grade: 12

Student Load: 8

Buttons: Add Assignment, Delete Assignment, Update Person, Cancel, Save Work

**Step 3-** Select the appropriate Job Code from the dropdown list, or type in the Job Code if you know it.

**Step 4-** Check appropriate boxes for Alternative Education assignment, Dual Credit assignment and taught by a Highly Qualified teacher. See previous page.

**Assignment by Person**

Edt?	School or District Name	Job Code	Description	FTE Unit	FTE	Grade Low	Grade High	Student Load
Yes	School 0765 Alberton School	FA01 Art		0.250 FTE	0.250	K	8	70
Yes	School 0766 Alberton High School	FA01 Art		P-4	0.125	9	12	8
Yes	School 0766 Alberton High School	PT Prep		P-5	0.125	9	12	0

Organization Name: Alberton High School (School 0766)

FTE Unit: P-4 - 0.125 FTE

Job Code: FA01 - Art

Additional Job Description: FA01 - Art

☐ This assignment is an Alternative Education assignment ☐ This assignment is taught by a Highly Qualified Teacher ☐ This assignment is a Dual Credit assignment

Lowest Grade: 9

Highest Grade: 12

Student Load: 8

Buttons: Add Assignment, Delete Assignment, Update Person, Cancel, Save Work

**Step 5-** Fill in Additional Job Description, Lowest Grade, Highest Grade, and Student Load. For Coops, the grade level fields are not enabled.

**Step 6-** Click Save Work when you are finished modifying or adding an assignment. Click Cancel to undo the changes and return the record to its original status.



## Special Education teachers with PK students

Assignment by Person

Baldwin, Jessica Ryan White, Non-Hispanic Female

	Name	Job Code	Description	FTE Unit	FTE	Grade Low	Grade High	Student Load
Yes	School 0766 Alberton High School	FA01 Art		0.250 FTE	0.250	K	6	70
Yes	School 0766 Alberton High School	FA01 Art		P-4	0.125	9	12	8
Yes	School 0766 Alberton High School	PT Prep		P-5	0.125	9	12	0

Organization Name: Alberton School (School 0765)

FTE Unit:  Click here to Setup Periods and Time Units

Job Code: SE04 - Special Education Teacher - Sole Provider

Additional Job Description:

☐ This assignment is an Alternative Education assignment ☐ This assignment is taught by a Highly Qualified Teacher

What percent of this assignment is allotted to 3-5 year olds?  %

Lowest Grade: PK

Highest Grade: 1

Student Load: 8

Buttons: Add Assignment, Delete Assignment, Update Person, Cancel, Save Work

For a Special Education teacher whose class includes PK students, you must indicate the percent of students in the class who are PK.

Continue editing/adding assignments for this person using the buttons provided. When this person's record is complete, click the Exit button at the top of the form to return to the Assignment Summary screen where you can choose the next person to work with or return to the main menu. **NOTE:** If the general job code (OT – Other (Instructional)) is used, an additional description of the job duties must be included in the text field titled "Additional Job Description."

## Transfer Assignments

You can use this button on the Assignment Summary page to give a previous staff person's assignments to a new person without re-entering the assignments for the replacement person.

Assignment Summary

2007-2008  
Teton (CO 58)  
Dutton/Brady K-12 Schools (SS 1072)  
Dutton/Brady K-12 Schools (LE 1235)  
Dutton/Brady Elementary (SC 1156)

School or District Name	Job Category	Folio	Person	FTE	Student	No. of Assign.
School 1156 Dutton/Brady Elementary	Teacher	72171 Adams, Carol A.		1.000	22	1
School 1156 Dutton/Brady Elementary	School Counselor	60632 Clements, Norma L.		0.188	78	2
School 1156 Dutton/Brady Elementary	Special Education	0 DeMars, Kathy		0.500	5	1
School 1156 Dutton/Brady Elementary	Teacher	53602 Duffy, Rebecca J.		0.405	50	3
School 1156 Dutton/Brady Elementary	Teacher	48410 Goodenowich, Patty S.		0.270	19	2
School 1156 Dutton/Brady Elementary	Teacher	51871 Hallinan, William J.		0.875	88	5
School 1156 Dutton/Brady Elementary	Paraprofessional	0 Hansen, Lauren		1.000	22	1
School 1156 Dutton/Brady Elementary	Teacher	40036 Hayward, Betty J.		0.800	12	1
School 1156 Dutton/Brady Elementary	Teacher	53221 Hinchcock, Brent M.		0.135	14	1
School 1156 Dutton/Brady Elementary	Building Administrative	48005 Megraw, James A.		0.500	109	1
School 1156 Dutton/Brady Elementary	Teacher	51240 Moss, Richard R.		1.000	12	1
School 1156 Dutton/Brady Elementary	Teacher	48077 Olness, Diane M.		0.400	6	1
School 1156 Dutton/Brady Elementary	Teacher	45740 Phillips, Kay F.		1.000	13	1
School 1156 Dutton/Brady Elementary	Teacher	60504 Rathert, Jana Marie		0.500	5	1

fmAssignmentSummary

Work With Person Add Person Delete Person Transfer Assignments

1. Select the former employee's name on the Assignment Summary Screen and click Transfer Assignments.

Transfer Assignments

Use this screen to transfer assignments from one person to another. This feature allows one to move one person's assignments to another person. All assignments for the selected person and school or district are moved from the old person to the new.

Move assignments from: Hallinan, William J

to: [Select a Person]

Transfer Assignments to New Person

fmAssignmentTransfer

2. Click Select a Person

Find a Person

Use this screen to find certified or noncertified staff. If the staff member can not be found, please add them as new. Check first. Do not add a staff member if they are already present in the list. If you search by SSN, enter SSN with no "-".

Search By: Last Name like Gardner

FolioID	Name	Gender	Race
72471	Gardner, Joseph C.	Male	UNKNOWN
72060	Gardner, Kristina K.	Female	UNKNOWN
68209	Gardner, Linda J.	Female	UNKNOWN
31989	Gardner, Linda J.	Female	WHITE
72929	Gardner, Linda Kay	Female	UNKNOWN
65561	Gardner, Lucy	Female	AMERICAN
28350	Gardner, Maryjo	Female	WHITE

Work with Selected Person Add a New Person Not Found in List

fmAssignmentPersonFind

Transfer Assignments

Use this screen to transfer assignments from one person to another. This feature allows one to move one person's assignments to another person. All assignments for the selected person and school or district are moved from the old person to the new.

Move assignments from: Hallinan, William J

to: Gardner, Linda Kay

[Select a Person]

Transfer Assignments to New Person

fmAssignmentTransfer

Confirmation Message

Complete the transfer of assignments?

Yes No

3. Use the search features described in **Add Person** to find the new employee name.

4. Click Work with Person.

5. That command returns you to this screen. The new person's name appears in the **to:** field.

6. Click Transfer Assignments to New Person

7. Click Yes to continue or No to cancel the transfer.

The new person's name will now be selected on the Assignment Summary page. Click Work with Person; follow instructions for that section to update student loads and grades low and high for each class assignment. You will also need to check or uncheck Dual Credit and Highly Qualified teacher checkboxes where appropriate.

## Add New Staff

To add a new name to your staff Assignment Summary list, choose **Add Person**. You will see this screen.

**1.** Search by last name, folio number, SSN or License number. Pick one.

**2.** Type in the last name, folio number or SSN you wish to sort by. Then click Find. You will get a list of matches to your search criteria.

**3.** When you find the name on the list, select it and choose this button to add assignments for that person.

**4.** If the name you want is not on this list, click here. Do NOT click here unless you are certain the name is not in the list. Check different spellings, search by SSN, folio number, etc.

This list contains the names of all certified educators in the state of Montana. Paraprofessionals and non-certified special education staff who worked in a school last year are also in the list.

The screenshot shows a 'Find a Person' window with search criteria (Last Name, Folio Number, Social Security Number, License Number) and a 'Find' button. Below is a table with columns: FolioID, Name, Gender, Race. At the bottom are buttons: 'Work with Selected Person' and 'Add a New Person Not Found in List'.

To search for a staff person in the list, a filter can be set to find the person by last name, social security number or folio number. Because names can change and spellings can differ, you will do better to sort by folio number or social security number whenever possible.

Choose the button for the detail you are searching by, type the detail you wish to match, and click Find to see a list of names that meet your criteria.

For example, you want to find John Doe but you do not know his folio or social security number. Choose the Last Name option. Type 'Doe' and click the Find button. You will get a list of all certified individuals with the last name of Doe. The list also includes licensed and non certified people who have worked in a Montana school in the past four years. Choose the appropriate one and click Work with Selected Person to begin entering assignments.

**Note:** If you have a new staff member who taught at another Montana school last year, the FTE from his/her previous assignment will still be attached to that person's record until the previous school district goes into this program and deletes it. You may get a message box telling you the person is over 1.00 FTE and asking if you want to fix the problem. As long as the person has 1.00 FTE or less at your school, you can ignore this warning. The issue will be resolved when all the data entry for the state is complete.

## Add a New Person Not Found in List

Only choose this option if the person you want to add does not appear in the previous list. You will not be able to add a folio number on this screen. If the person has a folio number, they should have been in the list on the previous screen. *Do not add a person here if he/she has a folio number.*

## Adding Licensed Professionals and Highly Qualified Paraprofessionals

If you are entering non-certified staff, either for a school or for a coop, you need to include the type of additional qualifications for the staff person and the license number, if any.

### Paraprofessional:

- Type name, gender and race
- Select the appropriate additional qualifications from the License Type drop down list.

### Licensed professional:

- Select License Type
- Use the Find box to filter the names in the License Info dropdown list.
- Choose the name and license number from the License Info dropdown list which is in alphabetical order by last name.
- The Gender and Race fields are pre-filled with default values; you must change those if they are not correct.
- The OPI does not require license information for accreditation purposes. However, NCLB requires that instructional paraprofessionals meet certain educational criteria.
- Some licensed professionals qualify for quality educator payments. In those cases, the license number from the License Info dropdown list must be selected before payment applies.

When finished, click Save and Exit. The person's name should now appear in the previous list. Select the name from the list and choose Work with Person to add assignments for this person.

The Exit without Saving button removes the name, gender and race, but License Type and License Info must be physically deleted or they will be saved even if you choose Exit without Saving.

### Updating existing Licensed Professionals and Highly Qualified Paraprofessionals

- For a person who was already on the list, but needs updated qualifications or a license number, select Work With Person and then Update Person. This same box will open, but will be pre-filled with the person's name and current information.
- Follow the instructions above to locate the person's license number or other qualifications.
- The name of the licensee from the license number registry will overwrite any name already entered.

If you need further assistance with personnel assignments, call the OPI Help Line at (406) 444-4050; option 8.

## 4 - Accreditation Data - School Level

Click on each tab to view the questions on it, or click on [Next](#) at the bottom of the screen to move through the pages. You must answer all the questions on all pages of this form.

The questions on this form change from year to year, so be sure to read carefully before answering.

There are nine page tabs for Accreditation Data. For each general question, you may respond with either a Yes or No. Type your answer in the appropriate space or choose from the dropdown list. Each general question has additional questions for further clarification. Type your answer in the space provided or select the checkbox when appropriate.

Do not include information about alternative education program sites when answering questions on Tab C about off-site locations. Alternative education program information is collected on a separate form.

You can move through the form by pressing the Tab key or clicking the [Next](#) button. If you want to go to a specific page, click on the page tabs located under your entity name.

Alternative Standards approved by BPE will be listed on Tab II. You will not be able to amend the Approved Variances or Alternative Standards. Applications for Alternative Standards must be sent to the OPI for BPE approval. If you have any questions about the information that appears on Tab II, please contact the Office of Public Instruction at (406) 444-4050 and select option 8.

## 5 – PIR Data and School Start and End Dates - *School Level*

When you click on one of these buttons, a popup box will open with more information. To close the popup, click the Exit icon in its upper right corner.

Enter the first and last days of school for pupils.

You must answer the professional development committee question.

Enter each PIR day of your calendar on a separate row.

Each PIR entry needs a date, an Activity Code (choose from the list), a brief description of the activity and the number of PIR hours for that activity.

Example: 10/18/08 PD Speaker: Mainstreaming in Math classes 6

If you have two or more different Activity codes for the same date, enter each activity on a separate row.

Example: 08/25/08 SO New staff orientation 3

08/25/08 PD Planning for the new CRT 3

To remove a PIR day, select that date and click the red X at the end of the row.

If you are doing the data entry for all schools in your district, and the PIR dates are the same for all of them, you can avoid duplicate data entry. Enter the PIR dates for one school in the district, then select Click to copy these PIR days to all schools in the district. Click Yes at the prompt; you will get a message box when the process is complete.

### Viewing More Instructions or an Example

Click on one of the buttons to the right of the Activity Codes box to view instructions or an example on the screen. Use the Exit icon in the upper right corner to close the Instruction or Example box. For questions about PIR reporting, call (406) 444-4050 and select option 8.

## 6 – Alternative Education Programs - School Level

**Alternative Education Programs**

2009-2010  
Mineral (CO 31)  
Alberton K-12 Schools (SS 0687)  
Alberton K-12 Schools (LE 0577)  
Alberton 7-8 (SC 1730)

Click to Select

Questions 1 - 5 | Questions 6 - 7 | Questions 8 - 12

**Purpose:** The purpose of this data collection is to identify which districts operate alternative education programs to serve at-risk students and gather identifying information about these programs. For OPI reporting purposes, an alternative education program is a "restructured" academic program to serve at-risk students and operated within an accredited public school.

1. Does your district operate an alternative education program to serve at-risk students?

2. Which choice below best describes where the students are served?

3. Do you modify graduation requirements (as provided in ARM 10.55.906 (3) & (4)) for the students served in this program?

4. Do you modify attendance requirements for the students served in this program?

5. When reporting personnel assignments for the Annual Data Collection, do you use personnel job codes AR01 (At-Risk) or OT (Other) to describe any of the personnel working in the alternative education program?

AR01 (At-Risk)   
OT (Other)

frmAltEdPrograms

If your school operates an alternative education program for at-risk students, you must answer all twelve questions on this form.

If the answer to question 1 is No, you will not see the rest of the questions.

Choose your answer from the dropdown lists, when available.

Use the Tab or Enter keys to move through the fields, or use your mouse to select the next question or tab.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 8.

## 7 – Indian Education - School Level

The text of the law has been included on the first page of this form for your convenience.

Use the Tab or Enter keys to move through the fields, or use your mouse to select the next question or tab. Choose your answer from the dropdown lists, when available. For questions E, I, J, K and L if you choose None or N/A, all the other answers for that question will be hidden or disabled.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 4.

**Indian Education**

2009-2010  
Mineral (CO 31)  
Alberton K-12 Schools (SS 0687)  
Alberton K-12 Schools (LE 0577)  
Alberton 7-8 (SC 1730)

Click to Select

Law | Board Policy | Teacher Knowledge | Curriculum And Instruction | Professional Development | Needs | Funding | Student Achievement

**Purpose:** This annual report will provide the Office of Public Instruction with information on school and district efforts to implement the requirements of MCA 20-1-501, Indian Education For All, and assist the OPI in planning for future staff development and technical assistance delivery options across the state. Each fall a summary of this report will be made available on the OPI website upon completion of the Annual Data Collection submission and analysis cycle.

A. Does your district have a board-approved policy about implementing Indian Education for All, per ARM 10.55.701(3)(a)?

B. Have your school board members received training regarding Indian Education for All in the past year?

C. Have your administrators received training regarding Indian Education for All in the past year?

frmIndianEducation



## 8 – Technology: Computers and Connectivity Report - School Level

**Technology Survey: Computers and Connectivity**

2009-2010  
 Yellowstone (CO 56)  
 Custer K-12 Schools (SS 1014)  
 Custer K-12 Schools (LE 0975)  
 Custer School (SC 1288)

Click to Select

**Purpose:** This annual report will provide the Office of Public Instruction with the necessary information for Federal reporting requirements and assist the OPI in planning for future staff development and technical assistance delivery options across the state. Please provide accurate and unduplicated counts for the specific school you are reporting on. Duplicated counts may negatively impact technology funding or program eligibility.

Federal reporting requirements require that OPI report the number of computers per school. OPI recognizes that computers are used across grade levels and Districts. However, some determinations must be made by the district as to how to report the computers. Possible ways to determine how to report shared computers are:  
 1. (Preferred) - provide the actual count by school (sc). Or  
 2. Divide the total number of computers in the district evenly across the schools in that district. Or  
 3. Another method as determined locally.  
 \*\*\*\* Regardless of the method used, do not report any one computer more than once\*\*\*\*

How many computers in your school are used primarily by Students:

How many computers in your school are used primarily by Teachers:

For each set of computers listed above (Student and Teacher), how many of them are connected to the internet by the following Connection Types?

**Student Computer Internet Access Type:**

Dial Up Internet Access

High Speed (Broadband) Internet Access

No Internet Access

**Teacher Computer Internet Access Type:**

Dial Up Internet Access

High Speed (Broadband) Internet Access

No Internet Access

What is the primary (or only) way that computers inside the school building connect to the Internet?

lmTechnology

In some districts, computers are shared across more than one school, but Federal reporting requires that the OPI report the number of computers per school. You will need to make a determination as to how to report your computers so that each computer is only counted once. Possible methods include:

1. (Preferred) - Provide the actual count by school (Sc).
2. Divide the total number of computers in the district evenly across the schools in the district.
3. Another method as determined locally that ensures each computer is only counted once within the district.

Enter the total number of computers primarily used by students at the school; then enter the number of those student computers that have dial up, high speed or no internet access. Do the same for the number of computers primarily used by teachers at the school. The sum of computers with the three types of connections should equal the total number of student or teacher computers you entered in the first question. Do not include in your counts any computers that are exclusively for administrative use.

The last question is about how your computers access the internet; hardwired or wireless access. If you have some of each, select the one that applies to most of your computers.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 5.



## 9 – District Personnel Recruitment - *District Level*

For the 2009-2010 hiring cycle, we want to know how many openings in each subject, support or administrative area existed, and how difficult it was to fill those openings. If you had no openings for this school year, check the box for "I have not Personnel Recruitment records to report."

**District Personnel Recruitment**

2009-2010  
 Mineral (CO 31)  
 Alberton K-12 Schools (SS 0687)  
 Alberton K-12 Schools (LE 0577)  
 All Schools (SC %)

☐ I have no Personnel Recruitment records to report.

**Recruitment Subject Area:**

Subject Area	FTE of Vacancies	Difficulty Filling:
Elementary	<input type="text"/>	<input type="text"/>
Middle School	<input type="text"/>	<input type="text"/>
High School	<input type="text"/>	<input type="text"/>

**Vacancy Summary:** (Double Click record to Edit or to Set it up for Delete)

AREA	FTEElem	ElemDifficulty	FTEMS	MsDifficulty
Elementary Education	3	Possible to Fill - Medium qualified applic.	0	

Delete Cancel Save

Select a subject, support or administrative area for which you had one or more vacancies. Indicate how many FTE were vacant for each grade level and how difficult it was to fill them at each level. Click Save. The record will then appear in the Vacancy Summary section right above the buttons.

To edit or delete an existing record, double click it in the Vacancy Summary list. Click Delete to remove the record, or make the changes and click Save; to cancel your changes without saving, click Cancel.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 8.

## 10 – Technology Integration Report - *District Level*

**Technology Survey: Technology Integration**

2009-2010  
 Mineral (CO 31)  
 Alberton K-12 Schools (SS 0687)  
 Alberton K-12 Schools (LE 0577)  
 All Schools (SC %)

Click to Select

**Purpose:** This annual report will provide the Office of Public Instruction with the necessary information for Federal reporting requirements and assist the OPI in planning for future staff development and technical assistance delivery options across the state.

Has the district fully integrated technology into the district curriculum through implementing the Montana Technology Content and Performance Standards as of December 31, 2008?

frmTechnologyDistrict

Answer Yes if the district has fully integrated technology into the district curriculum through implementing the Montana Technology Content and Performance Standards as of December 31, 2008.

Technical assistance can be provided by the Office of Public Instruction to districts who have not fully integrated technology into the district curriculum.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 5.

## 11 – Distance Learning Report - *District Level*

**Distance Learning**

2009-2010  
 Mineral (CO 31)  
 Alberton K-12 Schools (SS 0687)  
 Alberton K-12 Schools (LE 0577)  
 All Schools (SC %)

Click to Select

ARM: Tab A | Tab B | Tab C | Tab D | Tab E

**Purpose:** This annual report will provide the Office of Public Instruction with the necessary information to meet the requirements of 10.55.907 ARM – Distance, Online, and Technology Delivered Learning – Revised September 2008.

1. Does the district utilize distance learning to fulfill elementary or middle school basic education program requirements and/or high school graduation requirements as provided for in 10.55.907 ARM?

Next

frmDistanceLearning

The text of the law has been included on the first tab for your convenience.

If the answer to question 1 on Tab A is Yes, you will need to answer the questions on Tabs B and C. If the answer is No, Tabs B and C will be hidden; you will not need to complete them.

If the answer to question 6 on Tab D is Yes, you will need to complete Tab E. If the answer is No, Tab E will be hidden; you will not need to complete it.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 8.

## 12 – Testing Coordinators - *District Level*

**Test Coordinators**

2009-2010  
 Click to Select  
 Deer Lodge (CO 12)  
 Anaconda Public Schools (SS 0401)  
 Anaconda Elem (LE 0236)  
 All Schools (SC %)

Please enter the test coordinator for the district. This is the person responsible for the successful communication, coordination, and administration of statewide testing.

Enter the delivery (physical) address where you would like the system test coordinator to receive MontCAS materials. This form is pre-filled with information we currently have on file about your district testing coordinator. If the information is incorrect, make any necessary changes. When the information is correct and complete, check the box at the bottom indicating you have reviewed and confirmed the information.

First Name  E-mail   
 Last Name  Phone   
 Title

Postal Name   
 Delivery Address  Mailing Address   
 City  City   
 State  State   
 Zip  Zip

☐ I have reviewed and confirmed or corrected this information.

frmTestCoordinators

The form will be pre-filled with the information we currently have on file about your district testing coordinator. If the information is incorrect, make any necessary changes. When the information is correct and complete, check the box at the bottom indicating you have reviewed and confirmed the information. If you make changes and then change your mind, use the Esc key to return the form to its original state.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 3.

## 13 – Homeless Liaison - *District Level*

**Homeless Liaison**

2009-2010  
 Click to Select  
 Mineral (CO 31)  
 Alberton K-12 Schools (SS 0687)  
 Alberton K-12 Schools (LE 0577)  
 All Schools (SC %)

The District Homeless Liaison designated by the Authorized Representative should be an individual who is aware of his or her required duties, and is able to respond to questions or problems related to homeless students or their families regarding education issues.

This form is pre-filled with information we currently have on file about your homeless liaison. If the information is incorrect, please make any necessary changes. When the information is correct and complete, check the box at the bottom indicating that you have reviewed and confirmed the information provided.

If this information needs to be updated during the year, you must contact Clare Bridge at the OPI, (406) 444-0906.

First Name  E-mail   
 Last Name  Phone   
 Title  Fax

Address   
 City   
 State   
 Zip

☐ I have reviewed and confirmed or corrected this information.

frmHomelessLiaison

The form will be pre-filled with the information we currently have on file about your district homeless liaison. If the information is incorrect, make any necessary changes. When the information is correct and complete, check the box at the bottom indicating you have reviewed and confirmed the information. If you make changes and then change your mind, use the Esc key to return the form to its original state.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 7.

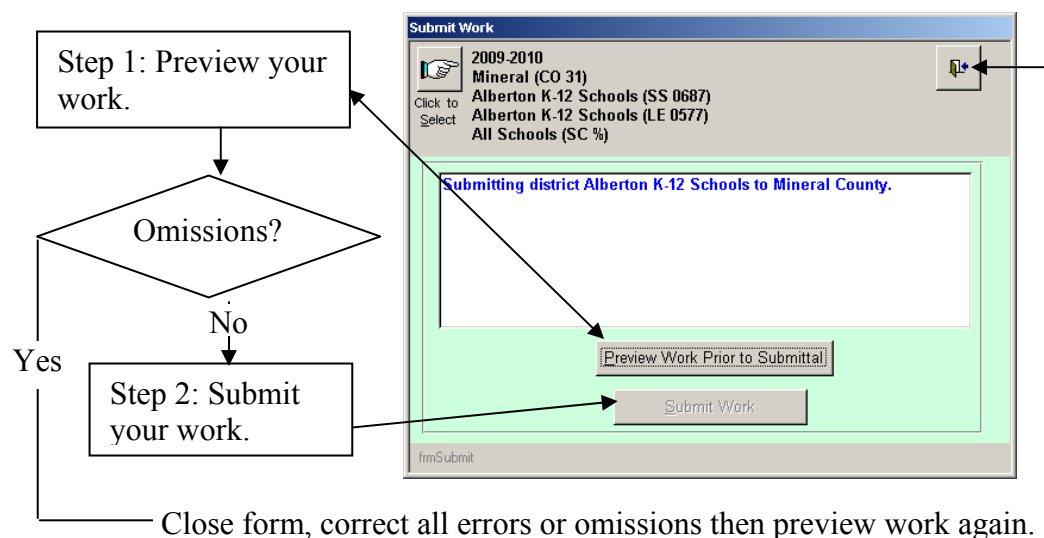
## 14 – Dual Enrollment Opportunities - District Level

On each of the four tabs, check the box in front of any statement that is true for your district. If you don't check True for question I, the boxes on the next three pages will be disabled and you will not need to provide any other information. Checking True for question I enables the first question on each of the subsequent pages. Depending in your answers to those questions, you may need to provide more information. In that case, check all statements that are true for your district.

If you need further assistance with this form, call the OPI Help Line at (406) 444-4050; option 6.

## 15 – Submit

The submittal process requires two steps. First, Preview Work Prior to Submittal and closely inspect your preview report. The report will indicate if there are errors that need correction. If so, leave this screen, correct the errors, and return to preview your work again. Once you are certain of your work, submit it by clicking Submit Work. The program will not allow you to submit if you have certain types of data missing. The preview report will list the missing pieces.



Once a user submits records, the ADC application restricts or inactivates the menu controls that allow the user to further modify data. To change data after it has been submitted, the user must contact the person to whom they submitted the work.

**School** users can change only their own school records and **submit to their district user**. **District** users can change their own school and district records and **submit to the county superintendent**.

**County** users can change school and district records for their counties, and **submit to the OPI**. **Special Education Coop** users can change only their own special education coop records and **submit to the OPI**.

### Processing Status

Ready for Data Entry  
Submitted to District Office  
Submitted to County Superintendent  
Submitted to the OPI  
OPI Review  
Ready for BPE Review  
Frozen

### Data Can Be Modified By:

All  
District, County  
County  
OPI Staff  
OPI Staff  
ADC Administrators  
ADC Administrators

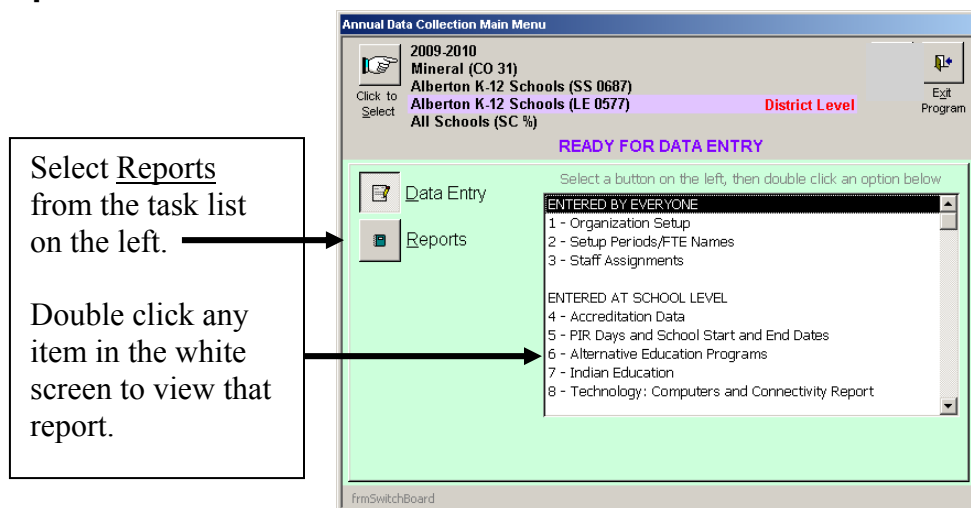
Once you have submitted, the software will review your data for completeness and create a Preliminary Accreditation Report, listing any deviations from the Montana Accreditation Standards.

## Preliminary Accreditation Report

**This report is the only notification you will receive regarding your preliminary accreditation status.** The OPI will make the listed recommendation to the Board of Public Education unless we hear from you by the deadline shown on the report. Please follow the instructions on the report for contacting the OPI regarding identified deviations.

This report is automatically generated as soon as you have successfully submitted your data. You can also access this report by going to the main menu and choosing the Reports button. Preliminary Accreditation report is the second item in the Reports menu. Double click to preview and print the report.

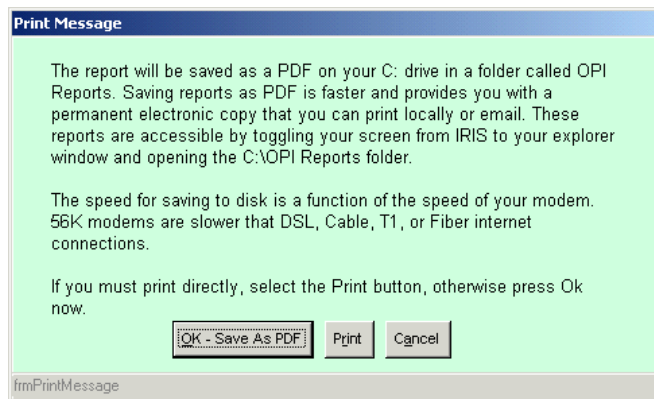
## Reports Menu



When you have completed your data entry, you will need to print copies of each report for your own records and to forward to your District office, and/or county superintendent. Do not send paper copies of the reports to the OPI. You can save a copy of any report as a PDF as soon as you complete it by clicking on the Preview Report button at the top of each form, or you can choose any report from the Reports menu and save as a PDF at that time.

Double click on the report name to preview any listed report.

When you are ready to print the report, click on the Print icon at the top of the page to see this message:



The best way to print reports is to choose Ok - Save As PDF. This option creates a PDF of the report and saves it to your C: drive in a folder called OPI Reports.

You can then open and print these PDF reports from your own computer, without being logged in to IRIS.

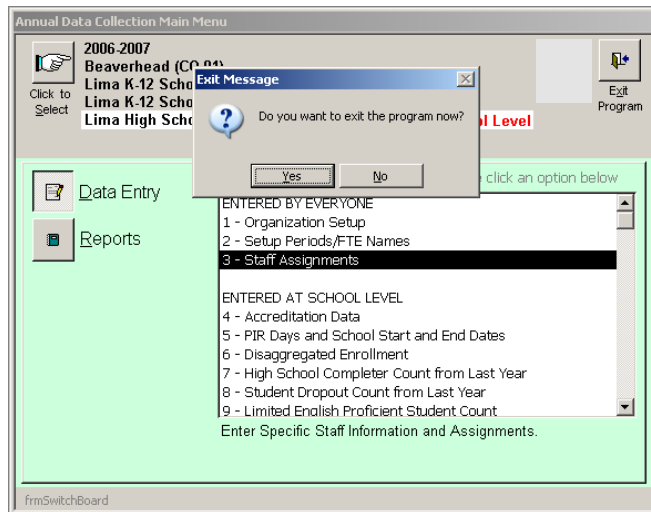
This option gives you a permanent electronic copy of your data, and it is much quicker than printing from the OPI Citrix server.

You can click on the Print icon to print the report while logged in to IRIS.

This option may be slower and you will not get a permanent electronic copy of your reports. Click Cancel and choose the Close icon at the top to close the report without printing it.

## Exiting Annual Data Collection

When you have completed your work in the Annual Data Collection program, the proper way to exit the program and leave the IRIS system is to click on the Exit Program button then click Yes to confirm exit. This will properly close all windows and log you off IRIS. You can then click the X box in the upper right hand corner to close your web browser.



## Thank You

Thank you for participating in the OPI's electronic Annual Data Collection program. Your comments and input are important to us as we continue to refine this process. Please send your comments and suggestions to Madalyn Quinlan, [mquinlan@mt.gov](mailto:mquinlan@mt.gov)

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## Hardware and software requirements

### Windows

The recommended system configuration to use Internet Explorer 6 Service Pack 2 (SP2) is Microsoft Windows 2000 or Microsoft Windows XP. Microsoft Vista is not supported at this time by OPI.

The recommended Citrix Client is **XenApp Web Plugin Version 11.000**.

Citrix Client requires installation by user with administrative privileges on workstation

### Macintosh

Power Macintosh G4 or greater

Memory 8mb of Ram as required for a web browser

Operating System OS X 10.2 (Panther) operating system

Video Not applicable

Hard disk 40 GB hard drive

Mouse As required for web browser

Citrix Client **Citrix online plug-in for MAC Version 11.0**

**Note:** A screen resolution of 800 x 600 or higher will provide you with the most efficient video resolution. A resolution of 640 x 480 will not provide you with a good working environment. To change your video resolution, right click on your desktop, go to Properties and select Settings. Move the slider bar under “Screen Area” until a resolution of 800 x 600 or higher is displayed. Click OK. You will be prompted to accept the new settings in the “Display Settings” dialog box. The monitor will blank and display the new settings under the “Monitor Settings” dialog box. If you do not click on the OK button at this point, your settings will be returned to normal after 15 seconds. If the video settings appear normal click OK and your monitor resolution will be reset.

If you experience difficulty getting to the OPI’s home page, try to reach another site like [www.yahoo.com](http://www.yahoo.com) or [www.google.com](http://www.google.com). If you cannot reach either of these sites, your problem is likely with your local Internet provider. Please give them a call. If you can reach other sites on the Internet, but cannot reach the OPI site, call the OPI Help Desk at 406-444-4050 and choose option 1 and then option 3.

Access to the Annual Data Collection is through the OPI home page at [www.opi.mt.gov](http://www.opi.mt.gov). At the OPI home page, click on the tab located at the top of the screen titled **IRIS**. This link will take you to the Internet Reporting and Information System Citrix Enterprise Portal.

If you have problems installing the Citrix software, please call the OPI Help Desk at 406-444-4050, choose option 1 and then option 3.



## Logging in to IRIS

The log-in page gives options for using IRIS.

mt.gov  
Montana's Official State Website

Log in

User name:  
Password:  
Domain:  
STATE

Advanced Options >>>  
Log In

Welcome to the Citrix Enterprise Portal.

If you do not know your login info, please contact your agency help desk or system administrator.

[Install Citrix Clients](#)

How to use the Java Client without installing anything on the computer.

IRIS  
IRIS Help  
View Reports  
Instructions

If you haven't updated your Citrix client software since December 2, 2008:  
Click on [Install Citrix Clients](#) and follow the instructions below.

If you have never used a Citrix application through our IRIS site before:

Mac users choose IRIS Help and select New Iris Clients for Macintosh! Follow the instructions given there to install the client.

Windows users, click on Install Citrix Clients. Follow instructions below.

If you already have the Client installed and updated, go back to page 4 – you are ready to enter data.



Click on Install Citrix Client

[Home](#) » [Technology in Montana](#) » [Citrix](#) » [Citrix Install](#)

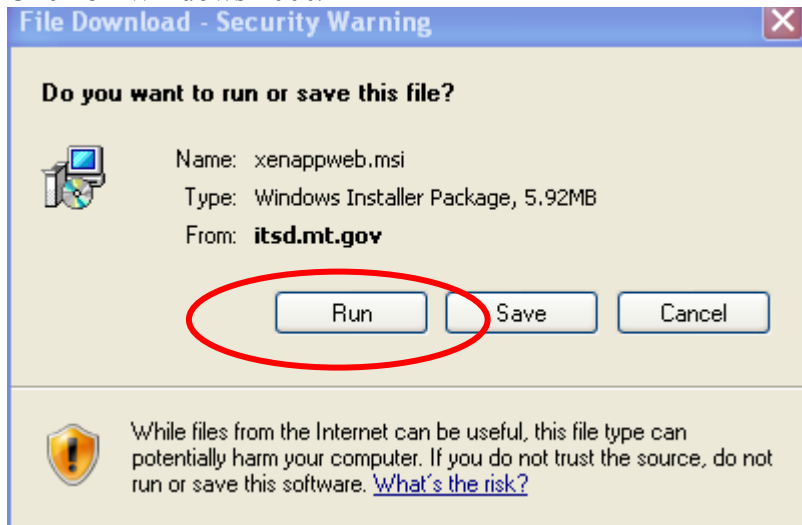
## Install Citrix Client

This version of the Citrix client snaps into the user's web browser utilizing Active-X. This is the primary client for users to access State of Montana Citrix applications. If you are connecting to this web site via a dial-up, please download the file and then install. If you have a high speed connection please install directly from this link.

**Windows 2000/XP** (XenAppWeb.msi - 6.06 MB) - Version 11, updated 12/02/08

Citrix web clients for other operating systems are unsupported by DOA ITSD but can be downloaded at Citrix's [web page](#).

Click on Windows 2000/XP



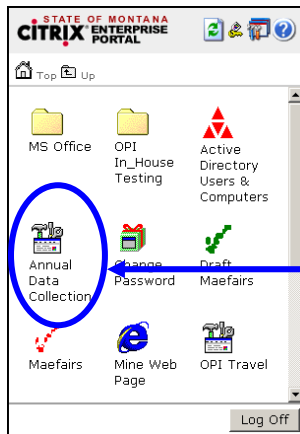
Click run and install the XenApp Web Plugin. When you are finished you will need to close and re-open your web browser.

### After Citrix client is installed

Congratulations! You have successfully connected to the OPI-CITRIX server and are ready to begin your work.

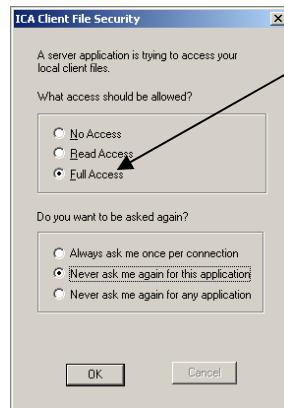


Log in using the User Name and password provided to you by the Office of Public Instruction. Leave the Domain at the default value. If you cannot find your User Name and password call the OPI Help Line at (406) 444-4050, choose option 1 and then option 2. A replacement copy can be mailed to the Authorized Representative for the district.



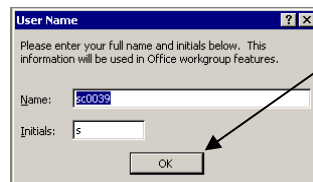
Choose the Annual Data Collection Icon.

The first time you use any Citrix application, you may see one or both of these boxes.



Select Full Access. The purpose of this selection is to allow access to the Citrix client software that you have installed on your computer. *This also allows Citrix to create a folder on your C: drive and copy PDF files of your reports to the folder.*

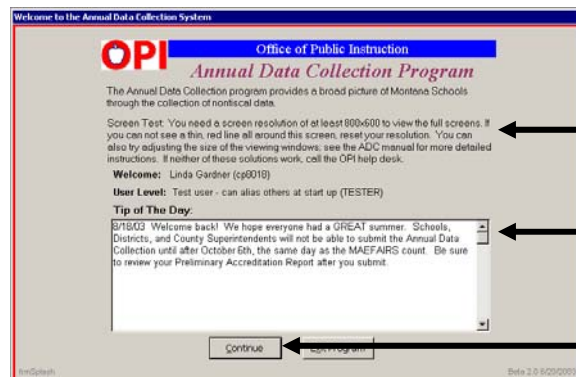
Depending on whether you ever want to be bothered with this message box, choose any of the options under “Do you want to be asked again?” Click OK.



Click OK. Don't type anything in either field.

## Annual Data Collection opening screen

If this is the next screen you see, you are ready to begin data entry.



Read the section on Screen Test; see the beginning of this manual for further instructions if needed.

Check the Tip of the Day for updates.

Click Continue to move on.